



enate
SIMPLIFIED SERVICE AUTOMATION

V2019.4 Release Overview

V2019.4

Enate Limited

info@enate.net
www.enate.net

1. Work Manager Changes

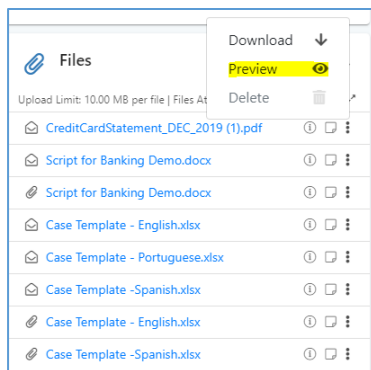
This section details the changes / new features in v2019.4 that can be found in the Work Manager operations environment. Other larger features are covered in separate sections.

1.1 Enhanced File Attachment Features (Comms, Files card)

A. Preview Of attachments in Comms / Files section

Documents within a work item can be previewed with a single click – this relates to any document files which can be seen in the **Comms**, **Timeline**, and **Files Card** sections. The document previews will open in a new tab.

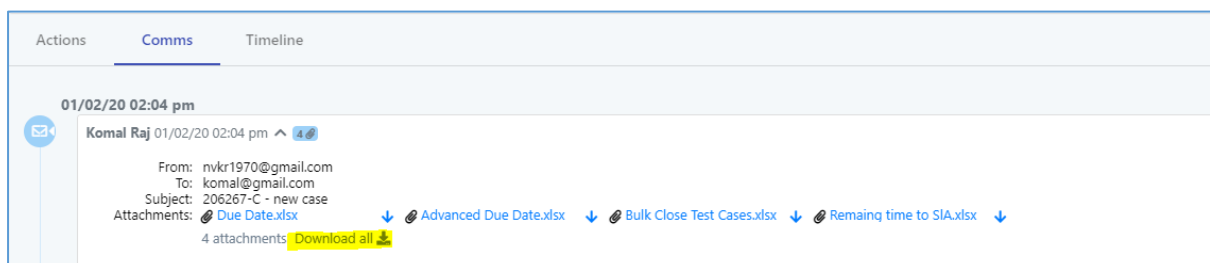
- Attachments in the files card can be previewed by clicking on the preview option



- If the file is not previewable, a confirmation banner pops out for the to explain this, plus offering an option to download the file.
- The file types supported for preview are as follows: **txt, pdf, jpg, jpeg, jpe, jif, jfif, jfi, png, gif, web, tiff, tif, heif,heic, svg, svgz.**

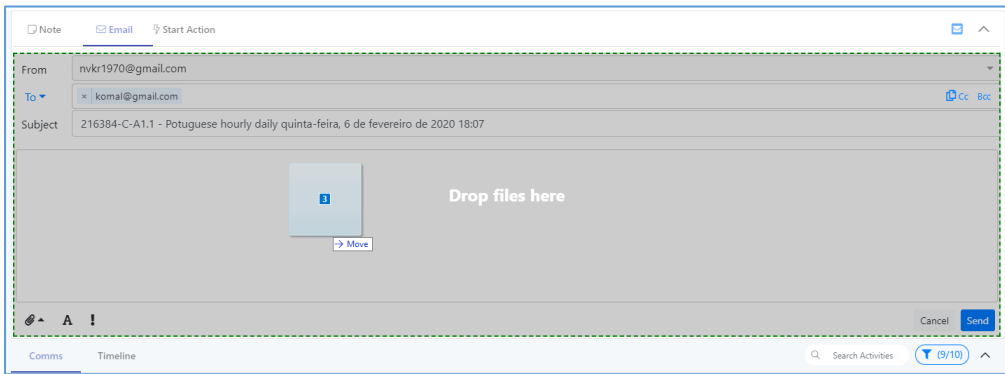
B. Download multiple attachments

It is now possible to download multiple attachments with a single click from mails in the comms and timeline section. Clicking on the 'Download all' icon will download all attachments present in that Comms/Timeline section item.



C. Drag and Drop of Attachments into Email Section and Files Card

The functionality enables users to drag and drop attachments into the **Email section** and **Files Card**. When attachments are dragged into **Email** and **Files card** sections, the section is highlighted with a green border.

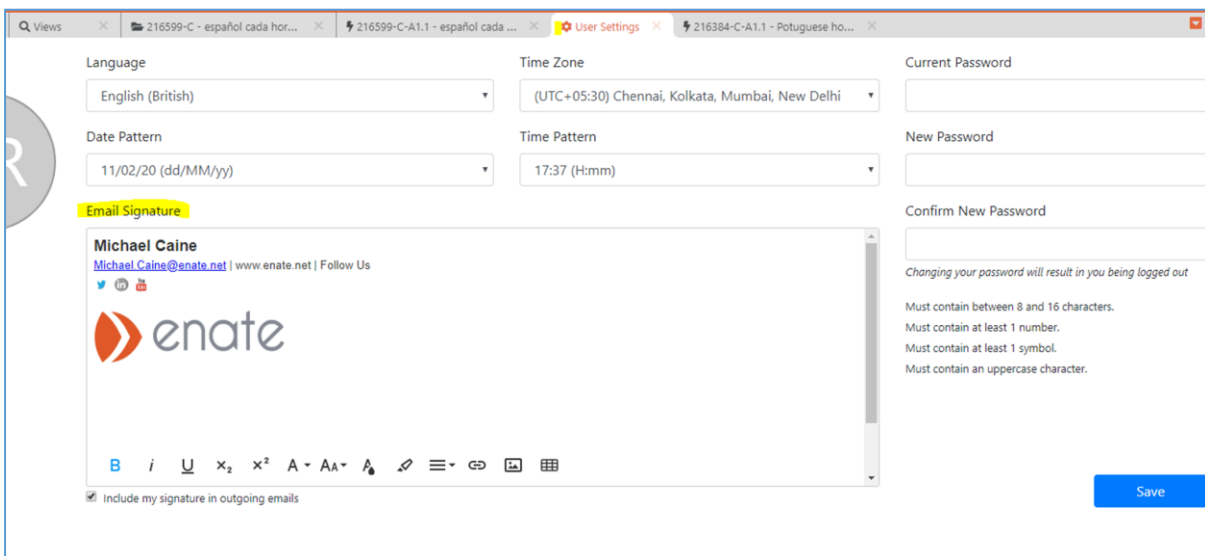


1.2 Enhanced Email Features

A. Personalised Email Signature

Enate's Email Signature feature allows you to configure your own signature for outgoing emails. The setting can be found in the user settings from the user profile tab, clicking on your username

In the resulting 'User Settings' tab, you can use the Email Signature section to define the signature content to be sent in outgoing emails which you write.



NOTE: The configured email signature will only be included with the outgoing emails if the **'Include my signature in the outgoing emails'** checkbox at the foot of this section is checked

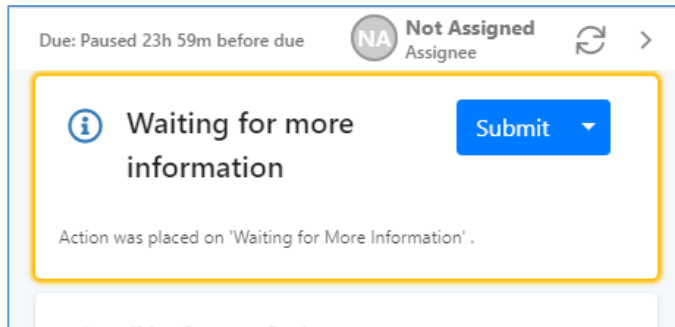
After you have created a signature, clicking on any of the links to bring up the 'compose new email' section in any work item will display the configured email signature at the bottom of the email body.

1.3 Display of Remaining Hours of SLA when Work Item is Pause.

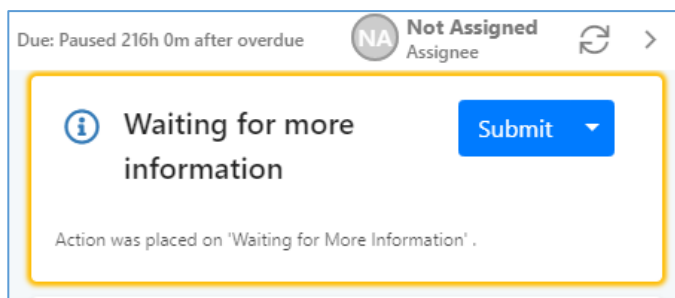
This feature is an enhancement of Stopping the clock on the work items which are in a state of pause.

If a work item is in a state of Pause, and the Due Date rule configured in Builder is set to 'Add wait time to due date', then the system does not display the due date in the header ribbon. Instead the system shows the remaining time left until the item is Due. If the work item is yet to pass the due date the the message will show as '**Due: Paused x h y m before due**'. If the work has passed the due date then the message will show as '**Due: Paused x h y m after overdue**'.

Example: work item which is paused where its due date is **on target** or **due today**.



Example: work item which is paused where its due date is **Overdue**.

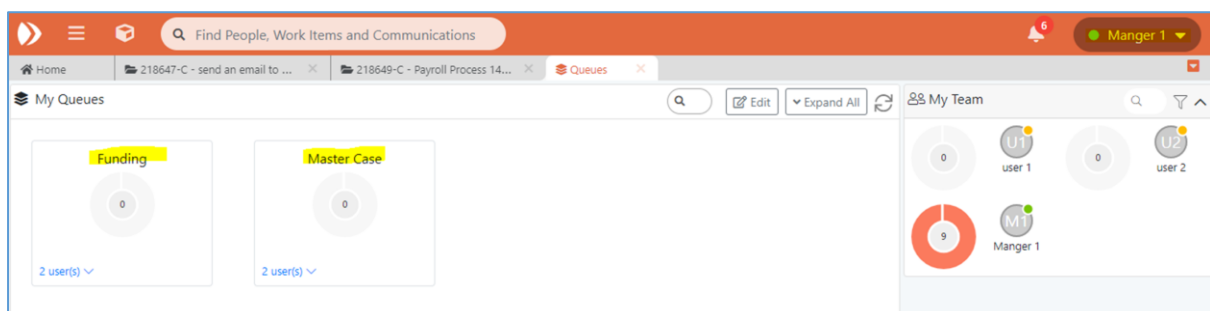


1.4 Test Mode Enhancements

A. Test manager and test users of the Queue

Test mode functionality now allows you to set a different manager for a Queue when running in Test mode vs. Live mode.

Example: Consider **Manager 1** who has access to live mode and is responsible for managing two queues, **Funding** and **Master Case** queue.



In Test Mode, these two Queues can be set to have a different manager – see below where now **Manager 2** has been set to be in charge of these two Queues when viewing in Testing Mode.



B. Test Contacts Separate test contacts in the system

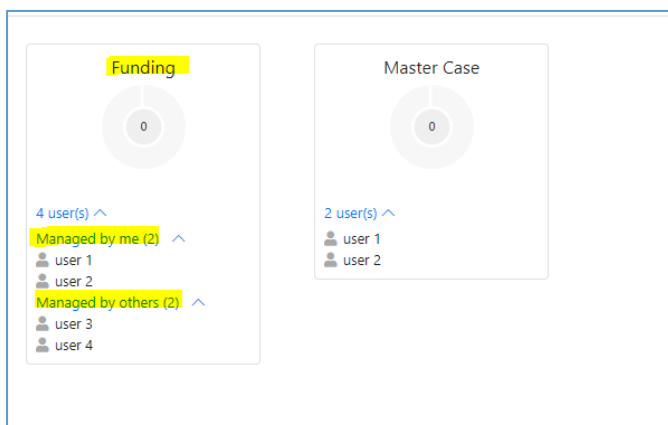
Enate now supports the creation of Contact records in Test Mode. Specifically, any contact records you create while running in Test mode will be accessible only to Test Mode users (and contacts created in live mode will be Live mode only). This helps to ensure that emails from test packets are not sent to production users, and vice versa.

1.5 Multiple Queue Managers

Queues can now be set to have more than one manager. This allows

Example: Consider Manager 1 and Manager 2 as two team leads where Manager 1 needs visibility on the queue of Manager 2. **Manager 1** can simply add the queue of **Manager 2** to his queues page to have the visibility of the same.

Click on the edit option and add the specified queue where it shows that the queue is managed by **Manager 2**. This no longer removes managerial responsibility from the current manager.



If a queue is managed by multiple managers then the users that are managed by you are filtered under **Managed by me** and the other users managed by other managers are filtered under **Managed by others**.

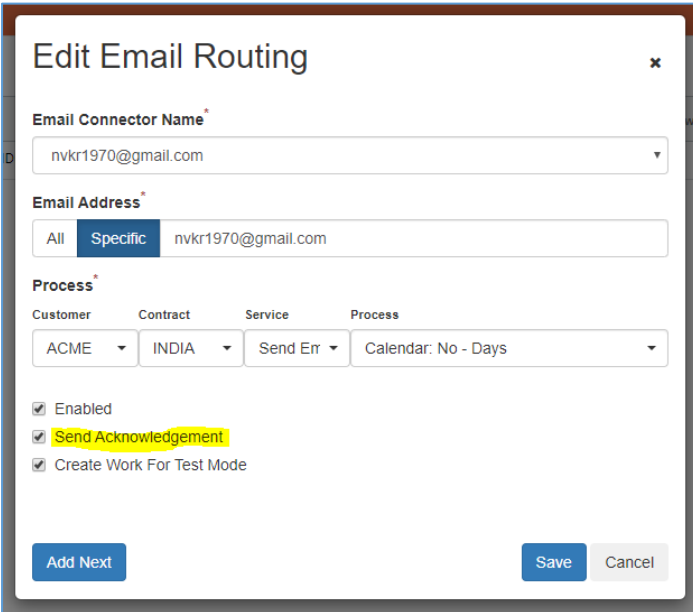
2. Builder Changes

This section details the changes / new features in v2019.4 that can be found in the Builder configuration environment. Other larger features are covered in separate sections.

2.1 Ability to send a Ticket Acknowledgment email to CC users.

This feature is an enhancement of the existing functionality where an auto-confirmation email or acknowledgment is currently sent only to primary contact/sender but not to the CC users.

With this enhancement, acknowledgment or auto-confirmation email is sent to CC emails tagged to the work item if send acknowledgment is checked in the email routing.



2.2 Migration of Defects to Builder

The configuration of Defects in Enate has now been migrated from Configuration Manager across to Builder. At the same time a number of changes have been made to the underlying architecture of the feature which results in some changes to functionality, and some migration aspects to be aware of both before and after migration.

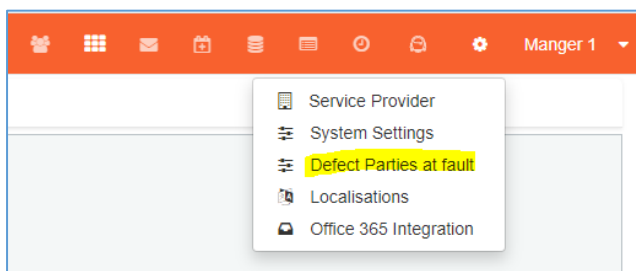
A. Changes

- Defect Categories are now managed in Builder.
- The 'Party at Fault' list can now be customised (in Builder). This was not previously possible.
- Defect Categories previously had to be a fixed number of Levels deep (1, 2 or 3). Now each Category can be up to 3 levels deep, and you can even mix-and-match some that are only a single level while others have multiple levels.
- The list of available Defect Categories is now shared by Case and Ticket rather than being a separate list for each.
- Defects can now be added to Actions.

- The defects applied to a work item is now shared with any related Cases/Tickets and Actions (just like Custom Data, Files, Contacts, etc). So a defect added to an Action shows on its parent Case. If that Case was launched by a Ticket then they would also show on that Ticket. Likewise if a Defect is added to a Ticket then it shows on the Case if one is launched from it.
- Defect Categories and Party at Fault list localisations are available and are managed in the standard localisation screen of builder.
- Previously, Defect Categories had both a 'hidden' underlying value and a Display Value which the user saw. This 'hidden' value no longer exists, there is just a single value defined.

B. Configuring 'Party at fault'

To configure new / edit existing Defect Party at fault values, click on the settings icon in Builder and select the 'Defect Parties at fault'.



This will allow you to add or edit the values available here.



C. Configuring Defects

To configure new or edit the migrated defects click the edit link on a Service Line and expand the new advanced settings, and Defect categories can be configured to three levels

In the resulting 'Update Service Line' popup, Defect category configuration can be carried out.

2.3 Service Matrix Page Improvements & UX changes

A number of improvements have been made to the service matrix page in Builder

1. The freetext search approach has been replaced with use of dedicated filters for Customer, Contract, Service to allow for easier drill downs to view specific groups of data.
2. The creation and modification of customer, contract, service is also available when using the above filters section.
3. Filters are persisted when returning to the service matrix screen from other sections in Builder, and also after logout/login.

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